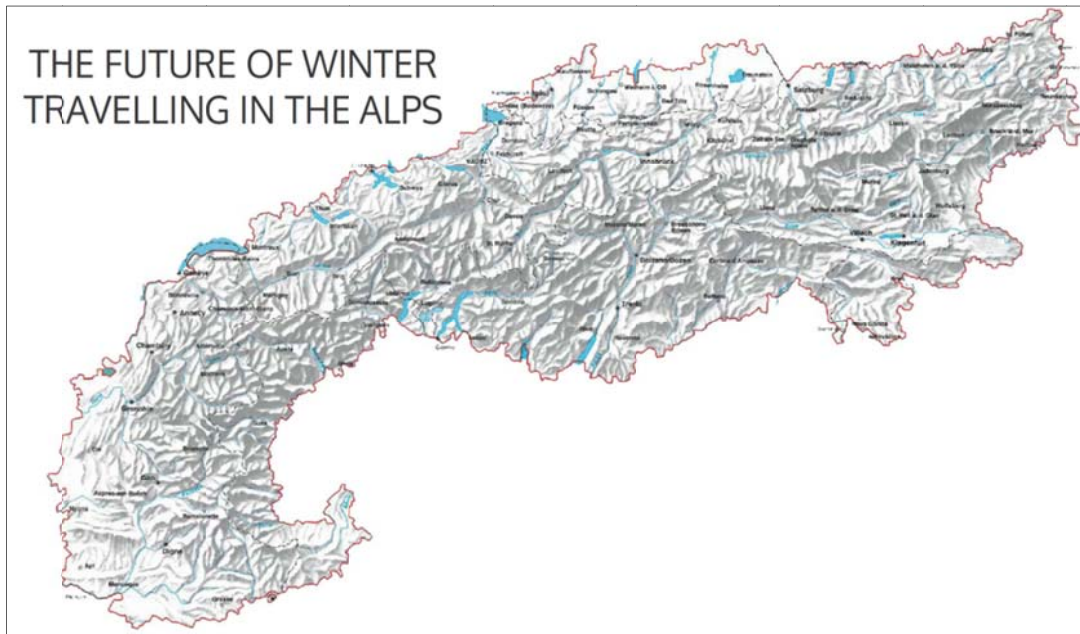


the future of winter travelling in the alps.

executive summary.



An AlpNet Research Project



Realized by Future Mountain International



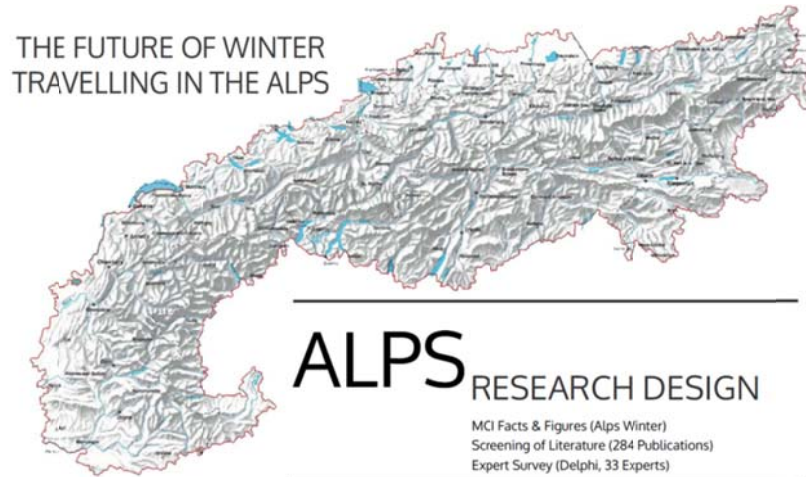
Project Partners



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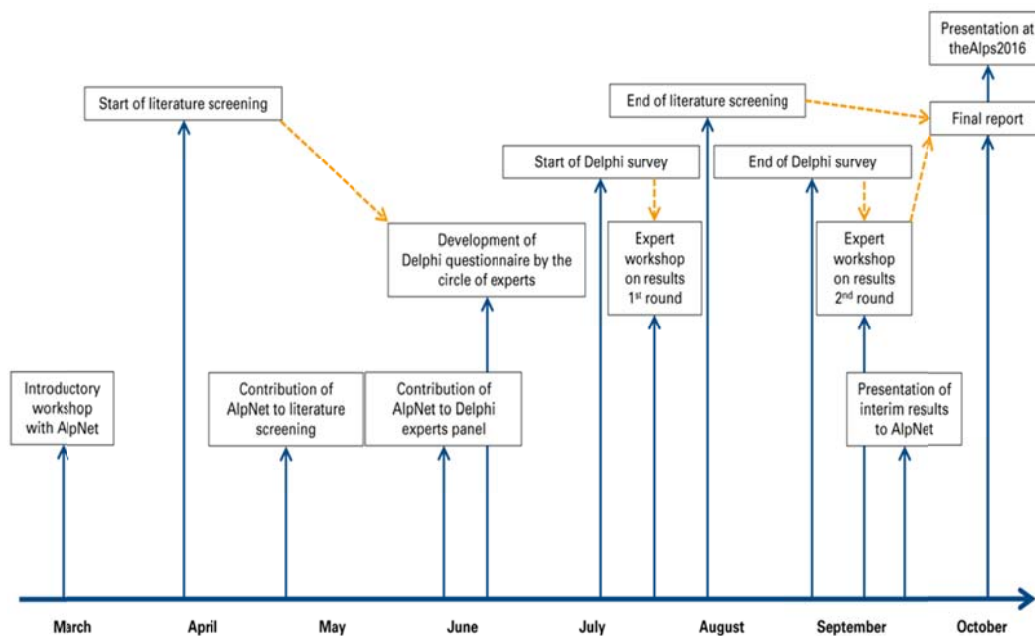
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introduction.

The study 'The Future of Winter Travelling in the Alps', commissioned by the association AlpNet and coordinated by Future Mountain International e.V., is unique in being an interdisciplinary and alpine-comprehensive project. Using a cross-national literature screening of over 290 documents as well as a Delphi study with 33 experts from academia and practice, the study examines the core question if and how winter tourism in the Alps can remain internationally competitive in the future. The research team consists of the institutions MCI Tourism in Innsbruck (Prof. Hubert Siller), the Institute of Outdoor Sports and Environmental Science of the German Sport University Cologne (Prof. Dr. Ralf Roth), and EURAC Research in Bozen (Prof. Dr. Harald Pechlaner). Specialist support was provided by Prof. Dr. Thomas Bieger (Institute for Systemic Management and Public Governance, University of St. Gallen, Switzerland), Willy Fux (LHM Conseil, La Motte-Servolex, France), and Prof. Philippe Bourdeau (Institute of Alpine Geography, University Grenoble-Alpes, France).



The Alps are one of the most popular and significant tourism regions worldwide. Data analysis within this project shows that the Alpine countries of Germany, France, Italy, Austria and Switzerland count ca. 386 million paid guest nights. Every seventh night within the European Union can thus be assigned to the Alpine regions. Within the Alps, winter tourism amounts to 43.3 % of all commercial overnight stays. Here, only every second bed is commercial, and every sixth is a hotel bed. Overall, 7.5 million beds in the Alps are assigned to the commercial sector. Although tourism traditions differ between Alpine regions, and although Alpine destinations stand in competition with each other, many of the central issues and challenges for the future are the same or, at the very least, similar.

theALPS

facts & figures

Sources (2016): MCI, BAK Basel, L.Vanat, W. Fux, DSHS (2012, 2015), Eurostat, Statistik Austria, TTR Tirol Tourism Research, Rhone-Alpes Tourisme, Comité Regional de Tourisme - PACA, Bundesamt für Statistik (Schweiz), ISTAT L'Istituto nazionale di statistica, DESTATIS Statistisches Bundesamt, Republic of Slovenia Statistical Office;

386 OVERNIGHT STAYS
mio.

386 million commercial overnight stays and another 126 million non-commercial overnight stays in the Alps.

43,3 WINTER
%

The share of winter commercial overnight stays in the Alps is 43,3 percent (Nov, 1 to April, 30).

14,4 EU - 28
%

At least every 7th commercial overnight stay of EU-28 is located in the Alps.

7,5 COMMERCIAL BEDS
mio.

Only every 2nd bed in the Alps is a commercial bed and every 6th a hotel bed.

screening of literature.

Alpine winter tourism has already been examined from a variety of perspectives. Existing studies and documents however are most frequently concerned with one specific theme or one specific alpine destination. In order to create a comprehensive database, a screening of different documents was conducted, including published and unpublished scientific studies, market research reports, annual business reports, presentations, student theses, magazines, websites etc. 294 documents were included in the screening and analysed according to previously identified categories.

SCREENING OF LITERATURE

Wintersport and wintersports travel is still very important for the German population. More than 50% of the Germans have experience in any kind of wintersports. But those who have not, by the majority, do no: want to collect any.
(Roth/Krämer/Görtz, 2012):

Snow has got a major meaning for winter atmosphere. Destinations without snow guarantee have to offer and highlight other elements related to winter atmosphere.
(Dunkelberg/Bausch/Sonntag, 2016)

Experiencing nature, sporting activities and fun are three motives which are important for respondents and also perform well when it comes to winter tourism in the Alps.
(Siller et al., 2015)

The profile of a typical winter guest can be stated with the following characteristics:
the winter guest is 45 years old, younger than the guest during summer; prevalence of family with children, balance in demand between relaxing and active holiday, also interested in topics such as culture, enogastronomy, wellness.
(Provincia Autonoma di Trento, 2015)

Year	Age Group	Gender	Participation (mio.)	% of Total
2013	15-24	Male	13	11%
		Female	11,5	10%
	25-34	Male	12,8	11%
		Female	12	11%
	35-44	Male	11,5	10%
		Female	10,8	10%
45-54	Male	10,5	9%	
	Female	9,8	9%	
2030	15-24	Male	41	41%
		Female	38	38%
	25-34	Male	37	37%
		Female	34	34%
	35-44	Male	33	33%
		Female	30	30%
45-54	Male	29	29%	
	Female	26	26%	

Skiing is the most important winter tourism activity, followed by winter hiking and tobogganing.
(Siller et al., 2015)

The greater part of skier exercises in an intensity that has a positive effect on the cardiovascular system. A repeated investigation also showed a positive prevailing mood throughout the whole skiing day, while negative feelings were more or less nonexistent.
(Müller, 2010):

Consumer and Travel Behaviour.

Solid knowledge of current and future consumer and travel behaviour is of existential importance for the development of services, products and marketing activities to meet the demands of continuously changing needs. Socio demographic developments such as increasing life expectancies, combined with decreasing birth rates, modified family structures, changes in lifestyle and individualized work-leisure-relationships are already directly impacting travel behaviour. Guests are increasingly experienced in travel, travel more often but with shorter durations, demand individualised and varied offers at their destinations, and are more difficult to satisfy. The guest wishes to remain active and healthy for longer, thus demanding appropriate offers for active relaxation, and also desires an authentic counterpart to a work environment often characterised by time pressure and stress.

Destination.

Winter tourism destinations consist of different actors who contribute positively to the success of destinations and are exposed to a certain reciprocal dependency. Furthermore, the human factor must be considered when it comes to destination leadership. Individuals and entrepreneurs remain important when it comes to developing and managing destinations. Different governance models are applied within destinations. Although there is mostly a prevalence of either the community and/or resort model, results indicate a trend towards an intermediate level between the two of them. In order to meet the changing (market) conditions, future development models must be established and discussed. The DMO (destination management/marketing organization) of a destination has an important role in destination governance and in managing a destination's stakeholders. This is due its networking capability. The networking approach to destination management contributes positively to the degree of collaboration within a destination. A destination's brand plays an important role when it comes to the perception of a holiday destination by the customer, as well as in the development of ski areas in winter destinations. Several studies highlight the importance of product diversification and the development of winter destinations to be able to react to changing (market) conditions. Winter tourism is a driver for added value for destinations but there are problems communicating this (both within the destination and outside).

Innovation and Product Development.

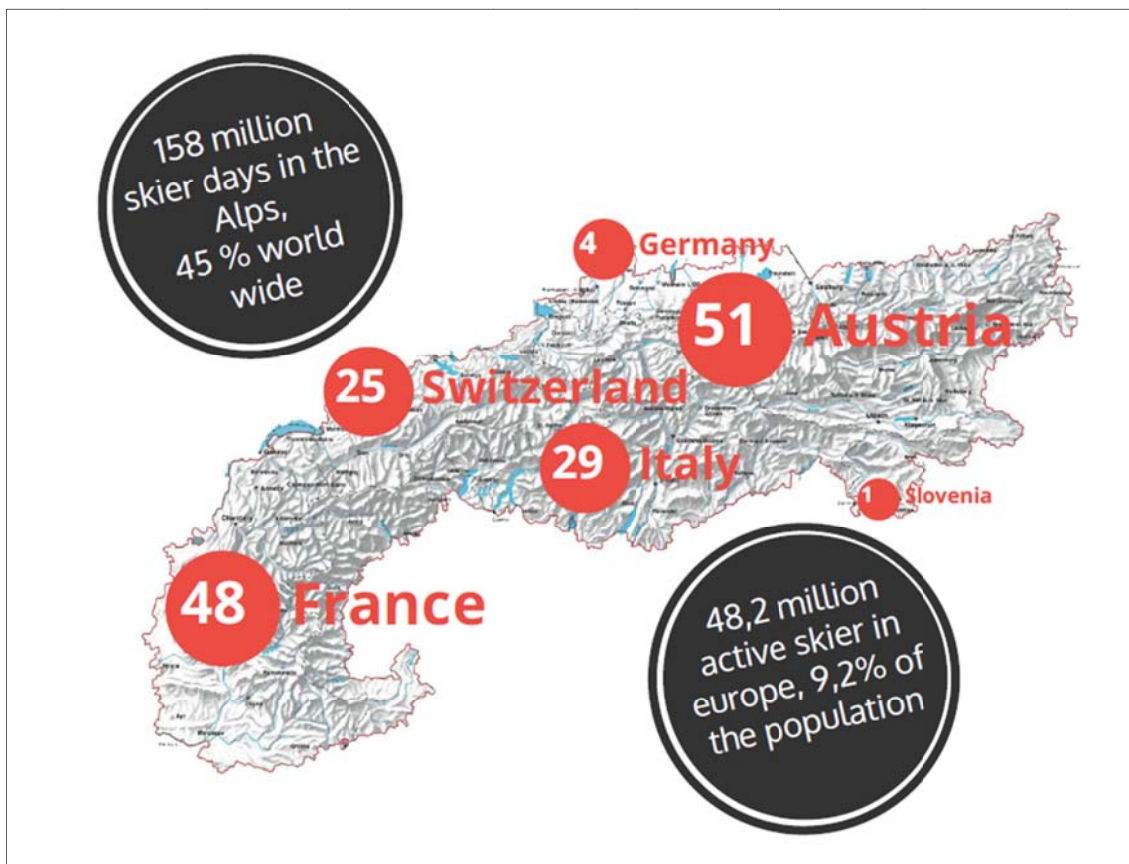
The traditional winter season is, despite the ongoing specialization, losing part of its impact and its market share is decreasing. This is why typical winter activities and related products in ski areas must adapt and be developed as year-round destinations. Possible adaption strategies to strengthen the destination during low-season are to develop cultural offers in the region, to offer different holiday packages and to offer support to local stakeholders regarding motivation, consultancy, infrastructure, grants, and platforms. Continuous innovation often takes the form of the slow appropriation, transposition and territorial "translation" and is gradually negotiated. One key stakeholder within this network is the DMO, as it has an important role as innovation enhancer and driver. This is why DMOs can act as mediators to transfer external stimuli into the destination as well as initiators for collaborative innovation networks. As a consequence, technical and infrastructure-based innovation will not be sufficient to guarantee ongoing rejuvenation and development of the winter industry. There is also a need for service-based and consumer-oriented innovation in winter tourism.

Mobility.

Mobility will remain a “big issue” in winter tourism, not only when travelling to the destination. Mobility is important while staying in the destination as well. As there is not always a connection between bus/train station and accommodation or attraction, issues with the so-called “Last mile” are common in Alpine destinations, especially in remote tourism areas. This is why further mobility solutions, as well as communication concepts must be developed. The transition to alternative mobility concepts and different strategies (e.g., sticks and carrots) can be used in order to bring the various needs and wishes of target groups together.

Winter Sports.

With an overall number of 48.2 million, 9.2 % of Europe’s population are currently active skiers. The Alps register 158 million ski days annually. This amounts to 45 % of all global ski days. Austria already registers nearly a third with 51 million ski days, France’s 48 million ski days amount to 30 %, Italy registers a further 29 million, Switzerland 25 million ski days, and Germany and Slovenia also contribute with four and one million ski days respectively. These figures highlight the existential importance of the economic factor ‘winter sport tourism’ for Alpine regions. Destinations are greatly dependent upon winter sport tourism, and often generate more than two thirds of their tourism-related value added from winter tourism. This secures employment and income from tourism, both in the destinations themselves and in the supplying industry. Although winter sport tourism is dominated by skiing, alternative offers including other types of activities as well as relaxation offers will increase in relevance.



Health and Recuperation.

Winter activities are often associated with a high injury risk. Results of research, however, show that even the more risky activities are less dangerous than common team sports. The bad reputation of winter sport exists due to a medial presence, which is especially high in case of worse injuries. On the contrary, winter journeys and winter sport in various forms can even contribute valuably to the health of people of all age. Winter hiking, cross-country skiing and sledging, as well as the more traditional skiing have been proven to reduce the risk of widespread disease and can improve health, fitness and wellbeing in general. Winter sport offers the possibility to increase the physical activity level and to prevent illnesses because of lack of activity. This meets the current changes of the winter travel market. Especially in light of the increasing health awareness of the population and the necessity to extend the range of offers to less snow dependent products, alternative winter activities can meet the society's need. This especially applies to the winter sport destinations more endangered through climate change.

Climate Change and Snow.

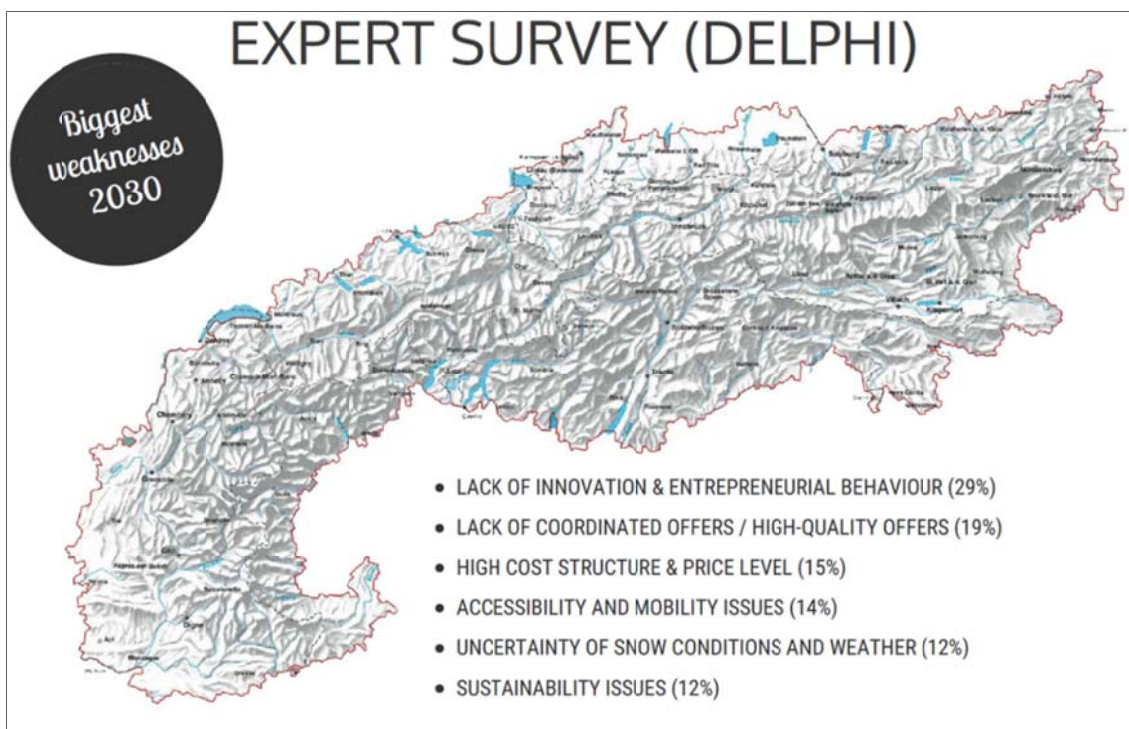
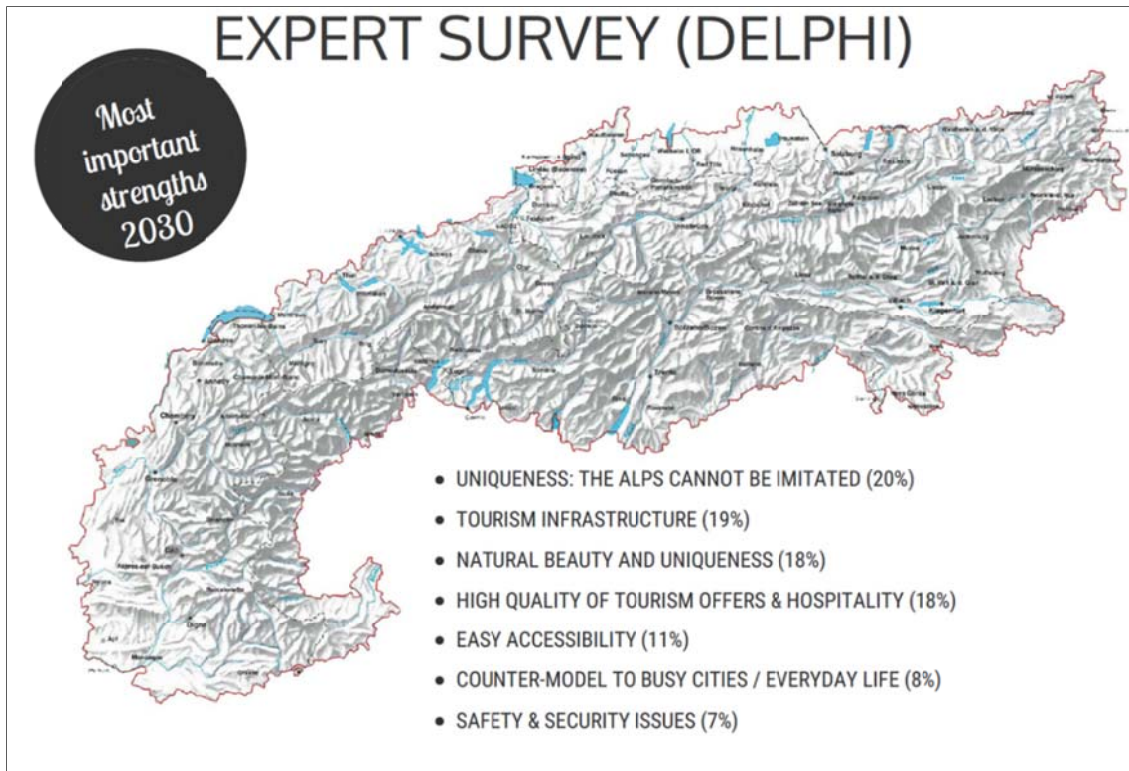
Experts agree on the fact that the climate in the Alps has changed significantly in recent decades, and that this development influences the future of winter sports. According to accepted scenarios, it is assumed that air temperature in the alpine regions will increase by ca. 2°C until 2100. In general, it will therefore become warmer in the long run, but for the alpine winters concretely no research consensus exists as to degree, speed and regional impact. Especially for the nearer future (2030) the location based framework of winter sports, like temperature, precipitation and duration of snow cover are not predictable. They are merely scenarios and not predictions. As snow is the central good for winter travelling in the Alps, this sector is very vulnerable to the impacts of climate change and earth warming. We have to learn handling this instability and variability. It is therefore of high importance to aim for a sustainable development and to implement resilient and location-adapted products in an on-site future-proof portfolio. Especially the journey towards the destination and accommodation are decisive for the touristic climate footprint, as they contribute 80% of the overall CO₂-emission. Therefore, they need to be given special attention. In this context, the motorized individual transport still represents one of the major challenges of winter tourism. Innovative mobility solutions between smart cities and winter sport resorts are of high importance.

Management of Resources.

It is the responsibility of the regions, destinations and key performers to develop themselves in a sustainable way and to secure jobs and income in rural areas in the long term. Focusing on a qualitative development will therefore need to have high priority. The total number of ski areas, runway kilometers and number of ski lifts will decrease in the long run, due to different framework conditions. An efficient energy, water and space management is thereby sustainable and can offer immense competitive advantages in the alpine tourism. Especially for the cable car companies and the hotel and restaurant businesses a reduction of the consumption of fossil energy as well as an increasing production and application of renewable energies are of high importance.

delphi survey.

During the summer of 2016, 33 experts from academia and practice, spanning five Alpine countries, participated in a Delphi study developed based on the five themes that emerged throughout the screening of the literature. The timeframe to be considered when answering questions was exclusively the year 2030. Panel mortality was low, as 27 completed questionnaires were submitted during the second round.



Trends and Developments.

Experts identified changes in consumer and travel behaviour, the need for nature and quiet, and the desire for a healthy lifestyle with a variety of sport and movement-related offers, as those developments that will positively impact winter tourism in the Alps. This, however, is contrasted by challenges such as a lack of offspring in ski and winter sports, climate change induced insecurities in weather, and the high price and cost structure in winter sport – subsequently having a negative

impact on the development of winter tourism in Alpine regions. According to experts' opinions, negative and positive influences are expected to be balanced, thus eliminating noteworthy changes in quantitative development. In the year 2030, the uniqueness and non-substitutability of the Alps, tourism infrastructure, scenic beauty and quality of hospitality will continue to allow the Alps to set themselves apart from the competition. Issues to be tackled in the coming years are a lack of innovative strength, the absence of coordinated high-quality offers, the high price and cost structure, and mobility and traffic problems, so as to eliminate potential weaknesses when compared to competitors.

Destination.

The quality of nature and scenery as well as the quality of hospitality and service will continue to be the pivotal success factors of Alpine destinations in winter tourism. Especially issues of mobility to and within destinations, safety, security, and the public image of Alpine winter tourism in general will increase in importance. According to the experts, especially DMOs, the hospitality sector, and cable car providers will emerge as the determining promoters of success.

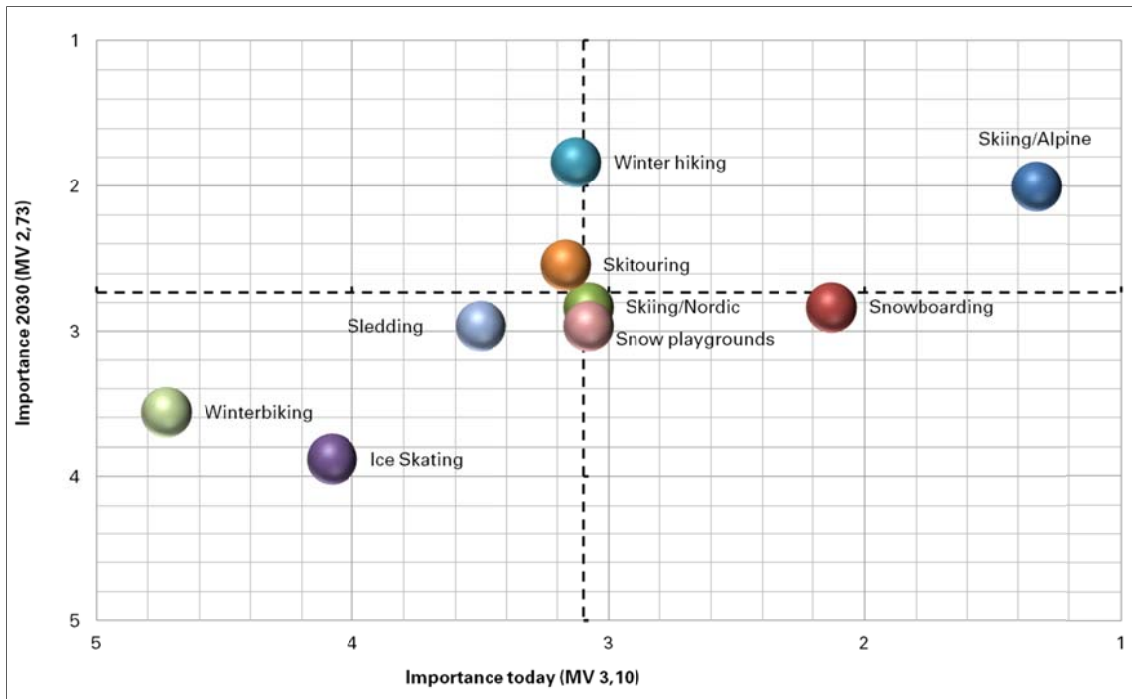
Mobility.

The importance of mobility and traffic issues to and within Alpine destinations will increase in the coming years. The most crucial task will lie in considerably reducing individual traffic when travelling to and within the destinations. Predominantly, measures will have to be implemented that allow for the easy, affordable and comfortable usage of alternative means of transport, including seamless solutions for the so-called 'last mile' to guests' accommodation.

Products and Markets.

Skiing will remain the most successful product for winter tourism in the Alps. Although alternative winter sport offers, especially winter hiking or backcountry skiing, will increase in popularity, they will not be able to replace the importance assigned to skiing. All the more important is it, according to the experts, to create the winter atmosphere expected by guests in regions and villages even during times of unpredictable weather. Apart from artificial snow, other adaptation and diversification measures (e.g. staging of light, Christmas markets, cultural and local traditions) will contribute to the continuous production of winter atmosphere within destinations. A third of experts however also added that the desired winter atmosphere cannot be guaranteed in the absence of snow security, thus advising for a change in brand communication. The image of Alpine destinations should be recreated to highlight the winter based options that are independent of snow supply.

Regardless of slight shifts in their respective importance, the current dominating source markets will remain equally significant in the year 2030. Most winter tourism guests in Alpine regions will be provided by the Alpine countries themselves as well as the Benelux countries, Great Britain, and central and east European countries. The importance of different target groups based on age will converge, with especially older target groups increasing in relevance.



Challenges.

When prompted to evaluate specific challenges that emerged throughout the literature screening based on their impact on Alpine winter tourism until 2030, experts judge climate change and its consequences unequivocally as negative. Within this particular timeframe, however, they do not see drastic changes in regards to quantitative development. Experts perceive the competitive advantage of the Alps regarding safety and security as positive, as well as the increasing desire of a large section of consumers for sustainability and regionality. Little to no importance is assigned to the sharing economy, progressive digitalisation, increasing migration and demographic change.

challenges.

For a successful future, three central challenges and spheres of activity emerged from the literature screening and Delphi study.



Sphere of Activity 01: „The Snow Experience Economy“.

Snow experiences are unique and not substitutable. Snow is the foundation of winter experiences while simultaneously exhibiting its own experience factor. Current market research studies identify winter sport, mobility, active relaxation and beautiful winter scenery and nature as the main travel motivations and experience dimensions. To further develop this sphere of activity, it is crucial to

invest in a successful and sustainable approach to create new generations of 'winter sport fans'. Access to winter sport through family, schools and ski schools needs to be enabled especially for children and youth.

Sphere of Activity 02: „Product Rejuvenation“.

The project team considers the classic 'ski holiday in the mountains' a brand of Alpine countries that has, for decades, offered winter guests the option of impressive winter sport experiences. Especially the development and improvement of technologies contributes to a more intensive experience, which is why skiing will continue to remain the core product of winter tourism in the Alps. To do justice to the changing demands of society, and the broad variation of target groups, a re-design of the classic product and an enhanced product portfolio is becoming increasingly important. Proactive businesses are indispensable for product innovation. But within destinations, good network structures, the creation of synergies on all levels, and clear responsibilities are essential for future competitive success. The future strengths are three spatially specific strategies: 'mobility space', 'attraction space', and 'experience space'. Winter sport areas' infrastructure and accessibility through cable cars define the quality of the mobility space, while services and products determine the attraction space. But especially the experience space can help destinations in increasing their success, as the evocation of emotions and atmosphere through experiences at the mountain carries great effective potential.

Sphere of Activity 03: „Sustainability & Climate Change“.

The last three winter seasons are the current benchmark and driver of strategy for the coming decade. The sector is prone to consequences of climate change and global warming, both in target and source areas. Experts agree that the climate in Alpine regions has changed significantly over the last decades. According to accepted scenarios, it can be assumed that the air temperature in Alpine regions will increase by ca. 2 °C (approx.) during winter. Temperature, rainfall and local winter sport conditions cannot be predicted especially for the near future, as factual weather, or rather the macro weather situation, overrides long-term trends. Until now, artificial snow technology can usually (over)compensate for variable weather conditions. A consequently sustainable service and product development, as well as increasing risk distribution amongst variable and supplemental offers, is required for vulnerable areas. The sustainable management of the resources energy, water, and surface is an economically sustainable investment that can create a competitive advantage in international tourism. In the near future, an increase in ski areas, cable cars and runway kilometres can be eliminated. The allegedly high CO₂ emission of winter sport tourism often gives cause for intense discussions. However, results of the screening also show that over 80 % of the carbon footprint, in all forms of leisure and tourism, is due to arrival journeys and accommodation. The majority of winter tourists come from the Alpine countries themselves – 70 % in France, nearly two thirds in Italy, while in Switzerland 55 % of guests are domestic. An exchange of winter tourism in the Alps to other tourism forms such as long haul travel, sun and beach or cruise ships invariably leads to a visible aggravation of tourism-related climate footprint. It is however undisputed that motorised individual transport to winter destinations is a major challenge. Innovative mobility solutions between Smart Cities and winter sport destinations have to be developed and implemented. A further result of the research project emphasizes the social sustainability of winter tourism. Sledging, cross-country skiing, winter hiking, but also traditional and regular skiing, foster physical activity and contribute to the prevention of mobility-associated diseases. They positively impact the development of children, strengthen the immune system, mental health and psychological well-being and inhabit a socially integrative function regardless of age.

„Winter holidays are of existential importance for the economic and social sustainable development of Alpine tourism.“

„Skiing will remain the core product of winter holidays in the Alps in the future, complementary movement and relaxation offers are indispensable for a sustainable development.“

„Winter sports offer unique snow experiences for all generations. Regarding children and youth, it is crucial if and how it is made accessible for them through family, educational institutions and ski schools.“

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